

REVISION HISTORY

| Date | CR | Version | Description | Author |
|----------|---------|---------|--|-----------------|
| 5/20/18 | CLS-003 | 10.0 | Baseline | Janet Alexander |
| 6/31/18 | CLS-089 | 10.1 | Removing first name search option. | Janet Alexander |
| 9/20/18 | CLS-106 | 10.2 | Added the ability to key-press the Enter key. | Janet Alexander |
| 12/20/18 | CLS-107 | 10.3 | Customer search criteria changed. | Janet Alexander |
| 3/11/19 | CLS-259 | 10.4 | Accessing lookup customer function changed. | Janet Alexander |
| 6/1/2019 | CLS-309 | 10.5 | UI changes made to opening UI. Changed lookup customer button graphic. | Janet Alexander |
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THE LOOKUP CUSTOMER PROCESS

Open lookup customer by selecting any of the five buttons located on the window's left side. Choose from Lookup Customer, Manage Customer, Customer Summary, Open Jobs, or Closed Jobs, depending on which functionality you require from the system. These functions all start by finding the customer's record and then return back to the previously selected option. If you choose the option Lookup Customer the system searches for the customer's records and then offers choices for all available services.



THE LOOKUP CUSTOMER OPTIONS

Conduct a search for a customer using one of the following options.

- Search by Last Name – select the radio button and then enter the customer's last name.
- Search by Account Number – select the radio button and then enter the customer's account number.
- Search by Phone Number – select the radio button, choose the phone type (cell or home) and then enter the customer's phone number, without dashes, including the area code and 7-digit number (5553331212).
- Search by Email – enter the customer's email.

CONDUCTING A CUSTOMER SEARCH THROUGH LOOKUP CUSTOMER

1. Select **Lookup Customer** or keypress **[Ctrl + L]** from the default window.



The *Search For Customer* window opens.

2. Select the search type radio button, if needed choose the phone type, and then enter the required information.
3. Select **Search** or keypress **[Enter]**.
 - a. Select **Cancel** canceling the process and the system returns to the default window.

The *Customer List* window opens listing matching records or the *Search For Customer* window displays a warning message of “No Customer Found.”

| Order Number | Last Name | First | Phone | Email | Address 1 | Address 2 | City | State | ZIP |
|--------------|-----------|---------|--------------|-------------------|-----------------|-----------|----------|-------|-------|
| AXG-895 | HEARD | SAMUJAL | 801.555.9632 | MH245@GMAIL.COM | 123 SOUTH MIAMI | | DALLAS | TX | 75235 |
| GHJ-636 | HEARD | SANDRA | 972.885.6363 | SHEARD1@YAHOO.COM | 197 CHURCH ST. | | ROCKWALL | TX | 75028 |
| BMJ-417 | HEARD | JAMES | 475.787.5556 | JH234@GMAIL.COM | FAIR OAKS DR. | | DALLAS | TX | 75240 |
| JEA-055 | HEARD | JONAH | 930.555.9955 | JON56@EMAIL.COM | CLEAR WATER TR. | | DALLAS | TX | 75024 |
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Customer List with matching records.

No matching records found.

4. If the *Customer List* window opens choose one of these steps.
 - a. Open the customer’s record by **double-clicking** the information line (if touch-screen **tap** information line).
 - b. Search again by selecting **Search Again** or keypress **[Alt + A]**.
 - c. Create a new record by selecting **Create New** or keypress **[Ctl + N]**.
 - d. Cancel the process by selecting **Cancel** or keypress **[Alt + C]**.

5. If the *Search For Customer* window returns with no customer found then complete one of the following.
 - A. Choose to **Create New** or keypress **[Ctl + N]** opening the *Create Customer* window.
 - B. Choose to conduct another search by selecting **Clear Search** and re-entering the information.

SAMPLE